The Tax Institute



Toowoomba | Power Tynan

Local Tax Club

Mar – Nov 2026 | CPD 1.5 / session

Join your Local Tax Club today!

The latest hot topics in tax and local connections

Looking to stay on top of the latest in tax while connecting with like-minded professionals in your area? Your Local Tax Club is the perfect way to keep your knowledge fresh, expand your network, and stay informed about the key tax topics that matter to you and your clients

Each local tax club features **5 sessions per year**, running from **March to November** covering a specialist tax topic presented by a subject matter expert. Included also is a comprehensive tax update to keep you informed about Australia's constantly evolving tax landscape.

Our flexible registration options mean you can register for the full series or just select the sessions you wish to attend.

Join your Local Tax Club today and gain access to valuable resources, deeper professional connections, and up-to-the-minute tax knowledge to keep you ahead of the curve.

Who should attend?

This series will provide you with quintessential updates and topical tax content tailored for you and your local tax community.

Schedule

24 March – 10 November 2026

1.5 CPD hours per session

Power Tynan, Toowoomba

Registration options

Full series

Register for the full series and receive an event reminder and materials ahead of each session.

Individual sessions

Tailor your attendance by simply indicating your preferred session/s on the registration form.

Technical Program

Date/Time	Session	Presenter
Tuesday 24 March 7:30 – 9:30am AEST Power Tynan 6/618 Ruthven St Toowoomba City	**Part 1: GST and real property transactions** Join Jodie Robinson of McCullough Robertson for a practical dive into tax issues in property subdivisions – from capital vs revenue, and enterprise GST to duty consequences. Featuring real-world case studies including the 'accidental developer' this session will arm practitioners with the latest knowledge to tackle important income tax, duty and GST issues that arise when dealing with real property transactions.	**Jodie Robinson, CTA** McCullough Robertson
Tuesday 5 May 7:30 – 9:30am AEST Power Tynan 6/618 Ruthven St Toowoomba City	**Part 2: Superannuation update** This session will provide advisors with practical insights into current superannuation issues including NALI, NALE and Division 296. If you have client's with SMSFs this is a session not to be missed.	**Hayley Mitchell** McCullough Robertson
Tuesday 14 July 7:30 – 9:30am AEST Power Tynan 6/618 Ruthven St Toowoomba City	**Part 3: ATO audits & current issues** Joanne and John will discuss with delegates the latest issues impacting advisers facing ATO audits with practical tips and tricks.	**Joanne Casburn, FTI** Cooper Grace Ward Lawyers **John Lean** Cooper Grace Ward Lawyers

Tuesday 6 October

7:30 – 9:30am AEST
Power Tynan
6/618 Ruthven St
Toowoomba City

Part 4: Budget Changes in Focus - Impacts for Tax Practitioners

With proposed Budget measures continuing to shape the tax landscape, practitioners need to stay informed and prepared for potential changes ahead. This session will explore key announcements and developments affecting taxpayers and advisers, including implications for capital gains tax, trusts and other emerging areas of interest. Join us for a practical discussion on what these proposals could mean in practice and the considerations for advisers navigating an evolving regulatory environment.

Kim Barnes
Bennett & Philp Lawyers

Emily Ryan
Bennett & Philp Lawyers

Tuesday, 10 November

7:30 – 9:30am AEST
Power Tynan
6/618 Ruthven St
Toowoomba City

Part 5: Navigating ATO Debt Enforcement and Payday Super

As the ATO sharpens its focus on debt collection and Payday Super reforms draw closer, businesses and their advisers face an increasingly complex compliance environment. This session will examine current enforcement activity, emerging insolvency trends, and the practical steps that can reduce risk, including the importance of acting early and understanding directors' personal liability exposure.

Michael Dullaway
Pearce & Heers Advisory Insolvency

Jody Ross
Pearce & Heers Advisory Insolvency

Presenters

Kimberley Barnes is a Special Counsel in the Business Advisory Team at Bennett & Philp Lawyers. Kimberley advises a range of clients, including individuals, families and business owners to help them manage personal and business concerns and plan for the future with confidence, in a practical, commercial and sensible manner that achieves the client's objectives. Kimberley has experience assisting clients across a broad range of succession and estate planning matters, including implementing strategies to facilitate the transfer of wealth and assets during a person's lifetime and managing the succession of complex groups and family dynamics. This includes providing advice and guidance on documenting bespoke succession arrangements, including bespoke trusts, governance provisions and family constitutions. Kimberley has strong experience in dealing with all matters relating to trusts, companies, partnerships and self-managed superannuation funds in a tax effective manner.

Joanne Casburn, FTI, is a Specialist Advisory at Mage Advisory, specialising in tax dispute resolution and litigation, including recent disputes involving trust issues such as section 100A, section 99B and Part IVA. She has over 30 years of experience, with 10 years as a former ATO Assistant Commissioner. In the ATO, Joanne who was responsible for the leadership of the private wealth audit teams in Queensland including Part IVA matters that have recently been decided in the Federal Court. Joanne was recognised in 2020 as a finalist in The Tax Institute's SME Tax Adviser of the year awards. She is also a State Councillor for the Queensland Branch of The Tax Institute.

Michael Dullaway is a Registered Liquidator and Chartered Accountant. He has over 20 years' experience managing corporate and personal insolvency appointments and providing advice and assistance to clients in financial difficulty. Michael's experience spans all industries including building and construction, hospitality, transport and consulting. He has worked on several large corporate engagements including both listed and unlisted companies and all types of corporate insolvency appointments.

John Lean is a lawyer in the Cooper Grace Ward Lawyers Tax and Revenue Team. He advises on federal and state tax matters and assists with the management of tax-related disputes. He has a dual degree in Law and Business (Accountancy) from QUT, along with a Master in Taxation from UNSW.

Hayley Mitchell has extensive experience in all facets of wills and estates, including complex estate disputes, estate administration, succession planning for high-net-worth individuals and business entities, and superannuation succession matters. With specialist knowledge in both estate law and superannuation, she provides strategic, commercially focused advice tailored to clients' individual and business needs. Hayley is regularly engaged to advise on estate planning, probate and estate administration, contested wills, and disputes involving superannuation death benefits, offering clear, practical guidance in often sensitive and complex matters. Hayley is an accredited specialist in succession law, an SMSF Specialist Adviser, and a member of the Queensland Law Society's Specialist Accreditation Advisory Committee.

Jodie Robinson, CTA is an Accredited Tax Law Specialist and Special Counsel in the tax team with McCullough

"The Local Tax Club is a great opportunity to understand not only the technical issues, but also how other professionals are dealing with the issues both practically and commercially"

Michelle Hartman, CTA

For event queries please contact the National Events team

nationalevents@taxinstitute.com.au
1300 829 338

Robertson Lawyers. Jodie is passionate about providing clients with results-driven, commercial advice and solutions for their taxation and business needs. Jodie regularly advises on the tax consequences of the sale of significant businesses, business restructures, including applicable rollovers and duty exemptions, and holding company interpositions. Jodie also assists clients and their advisors in obtaining private binding rulings and dealing with payroll tax self-review audits.

Jody Ross is an insolvency professional working closely with accountants, lawyers, financial counsellors, bookkeepers and business bankers across our regional towns of Toowoomba, Dalby, Chinchilla, Warwick, Stanthorpe and the surrounding towns. Jody provides insolvency advice to those facing financial stress, including small businesses, sole traders and individuals. I have the responsibility to ensure I provide these individuals and small businesses with a pathway out of financial stress whilst ensuring all stakeholders receive a high level of care and empathy.

Emily Ryan, CTA is an Associate in the Business Advisory Team at Bennett & Philp Lawyers. She works closely with individuals, families, and business owners to help them plan for the future with confidence, providing practical and tailored advice that aligns with their personal, family, and commercial objectives. She has experience assisting clients across a broad range of succession and estate planning matters, helping them implement strategies to facilitate the transfer of assets and control across generations. Her experience includes preparing simple and complex estate planning documents (e.g. wills, enduring powers of attorney and advanced health directives), as well as advising on and documenting succession arrangements to pass control of related entities (e.g. trusts, companies, self-managed superannuation funds etc.) to future generations. Emily also assists executors, administrators, and beneficiaries in the administration of deceased estates, providing practical guidance throughout the estate administration process. She advises on a range of estate-related matters, including obtaining grants of probate and letters of administration, administering estate assets, and advising on any estate taxation issues that may arise.

The Tax Institute

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A tax invoice and confirmation letter will be sent on receipt of your registration. Please photocopy for additional delegates and retain original copy for your records. All prices quoted are in Australian dollars and include GST where applicable. ABN 45 008 392 372.

1 Registration

Please select your registration type:

	Member	New member*	Non-member
Full series registration	☐ $350	☐ $745	☐ $500
Single session registration	☐ $100	☐ $495	☐ $150

Please select your session/s:

☐ Tue, 24 March 44806 ☐ Tue, 5 May 44807 ☐ Tue, 14 July 44808 ☐ Tue, 6 Oct 44809 ☐ Tue, 10 Nov 44812

Dietary requirements:

Promotional code:

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- access member-only prices to this and future events
- access all member-only technical resources.

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I hereby apply for membership of The Tax Institute and declare that I am a person of good fame, integrity and character. I agree to be bound by the Constitution of The Tax Institute.

Signature:

Date of signature: DD/MM/YYYY

2 Delegate contact details

Member no.: If your member details are up-to-date, you can skip this section.

Title: ☐ Mr ☐ Mrs ☐ Miss ☐ Ms Date of birth: DD/MM/YYYY

First name:

Last name:

Position:

Company:

Address:

Suburb: State: Postcode:

Telephone: Mobile:

Email:

☐ Please tick this box if you do not wish your name to be included on the delegate list provided to all attendees for networking

3 Payment method

Please note: all registration payments must be made prior to the event, unless other arrangements have been made with The Tax Institute.

☐ **Cheque payable to The Tax Institute** (in Australian dollars)

☐ **Credit card** Card type: ☐ AMEX ☐ Visa ☐ MasterCard

Name on card:

Card no.: Expiry date: MM/YY

Cardholder's signature:

For our refund, cancellation and replacement policy visit taxinstitute.com.au/professional-development/event-policy.

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To register **Email** customeradmin@taxinstitute.com.au **Mail** Level 21, 60 Margaret Street, Sydney NSW 2000 **Online** taxinstitute.com.au/Toowoomba

The Tax Institute gratefully acknowledges the generous assistance of members of the Organising Committee:

Tom Delany, CTA, Tax Partner
Alan Gill, CTA, Lutz & Associates
Paul Hobbs, CTA, Power Tynan
Jodie Robinson, CTA, McCullough Robertson

Proudly hosted by:

Power Tynan

